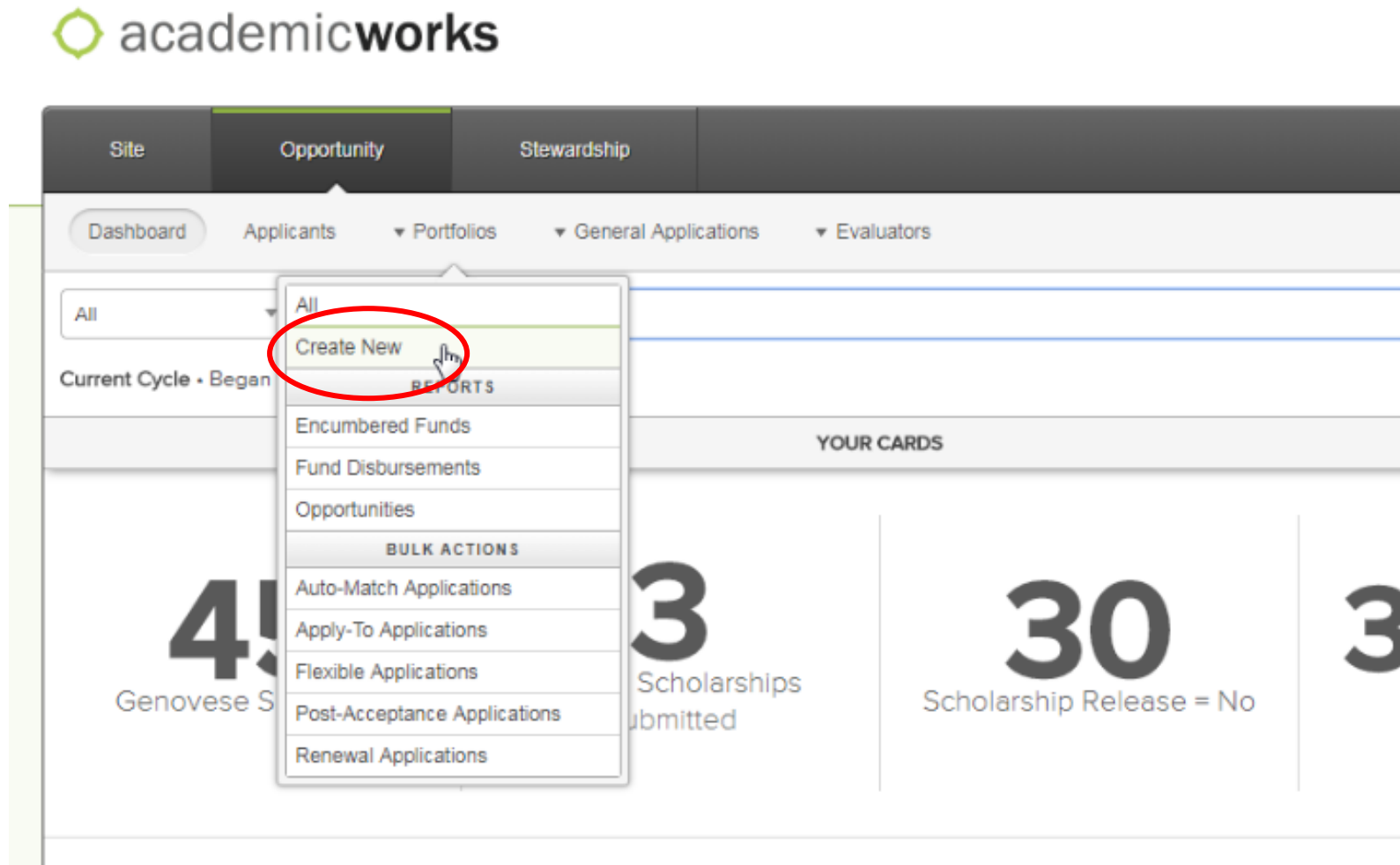


AcademicWorks Quick Guide – Create Auto-Match Portfolio/Opportunity

As new gifts or endowments come to the University (or Foundation), you will need to create corresponding opportunities within the AcademicWorks system. This guide walks you through the process of creating a new opportunity.

Force Apply:

1. Select Opportunity>Portfolios>Create New



2. Complete the **Create a New Portfolio** page adhering to the following standards:
 - a. If awarding by term, two portfolios need to be created. One will be for the fall and one for the spring. The portfolio name should include a corresponding suffix. See example below.
 - b. The appropriate item type should be entered into the **Fund Code** field.
 - i. If there is no named item type, you can enter the departmental aid item type which is 640000020201 for fall term and 640000020202 for the spring term.
 - c. The **PTAEO** (project.tast.award.org) should be entered into the **Auxiliary Fund Code** field.
 - d. If the opportunity is stewarded, the appropriate donor should be selected.
 - e. The **Scope** will correspond to your school (and there should only be one available for you to select).
 - f. **Visibility** should be 'Always Hidden' unless this is an 'Apply To' scholarship where the student must complete an application or self-identify.
 - g. **Initial Opportunity Details** – the Create Portfolio page gathers information for creating an initial opportunity under the portfolio. This information will be managed at the opportunity level if edits are required and includes the following:
 - i. **Start and End Dates** – for auto-match opportunities, these can reflect the award period; for apply-to opportunities, these should reflect the application period.
 - ii. **Review Period Dates** – if the opportunity will need an applicant review group, these dates should be set accordingly for the review time period.
 - iii. **Archive Date** – DO NOT USE (this is used to archive the opportunity on a specific day and we are not using that feature).
 - iv. **Description** – Enter description text noting that this will be viewable to students if the opportunity is visible.
 - v. Type – '**Auto-match**' should be selected unless the student needs to complete an application specific to the opportunity to qualify and then see **Create Apply-To Portfolio/Opportunity** quick guide.
 - vi. **Propagate General Application Scores** – this should not be selected as there are no scores for the general application as we are not using the reviewer process at the general application level.
 - vii. **Source** – General Application should be selected unless your school/department has created a conditional application that all your students complete before awarding (this would have been created through SFS).
 - viii. **Reviewer note** – these are notes reviewers see and would only be used if you have a Reviewer group set up and want to provide general information to them about this opportunity.
 - ix. **Post-Acceptance Questions** – this box should be checked if you want students that have received an award to come into the system and complete any follow-up items (thank-you letter, questionnaire, etc.)
 - x. **Total Awards** – if there is set number of awards given out for this opportunity, enter it here. If not, you can leave it at 0 – this is a numeric field. This field is not visible to students.

- xi. **Opportunity Amount** – if you have the total amount of funds available for awarding this year, you can enter it here. This field is not visible to students. However, any awards will be decremented from this amount and the opportunity details will show this calculation and updated available amount as you award.
- xii. **Visible Award Amount** – this field is displayed to students in the details of the opportunity. If the same amount is given to every awardee each year, you can add that here. If that's not the case, you can also enter '**Amount Varies**' and that will display to students. Don't leave this blank, otherwise the system will divide the opportunity amount by the total awards and display that amount which most likely won't be accurate.

3. Upon completion, select **Create Portfolio** at the bottom of the page.

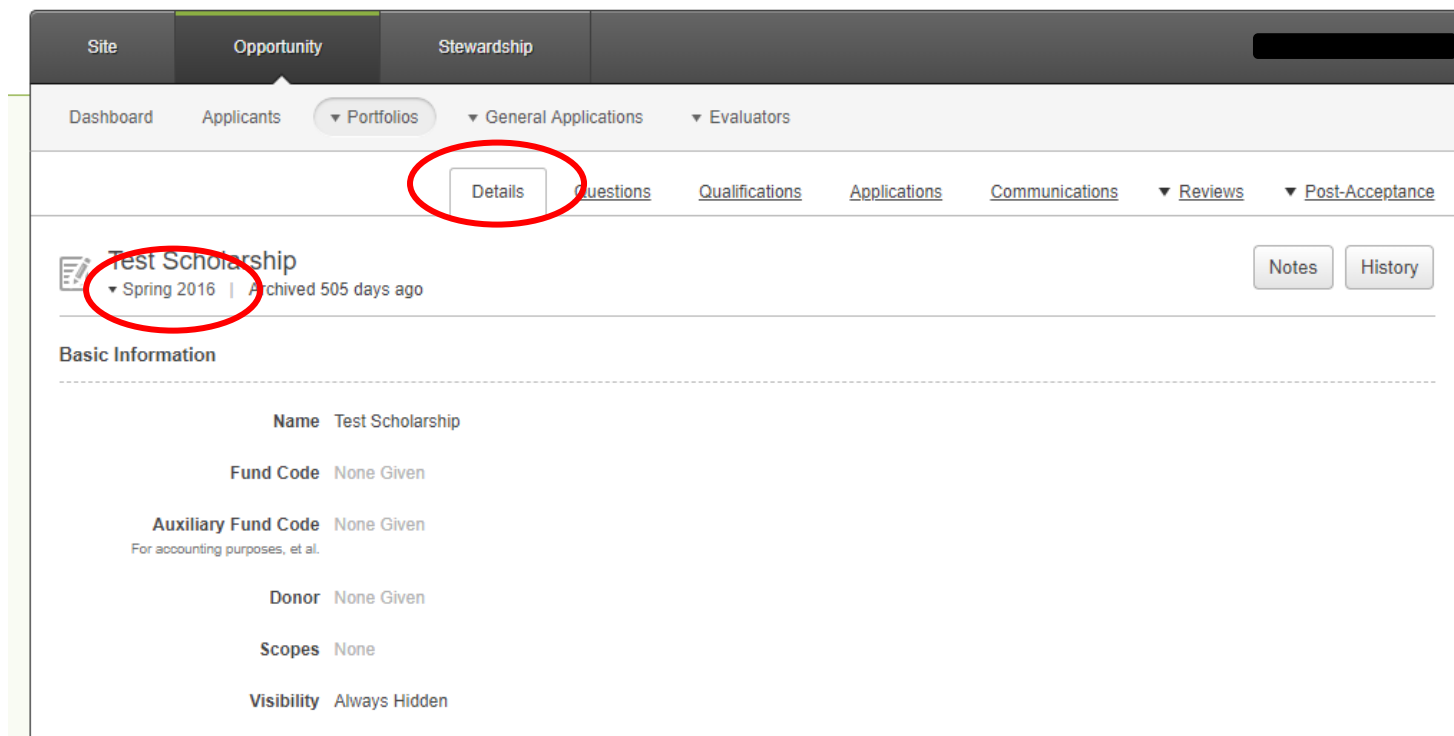
4. The system will save the new portfolio, create a new opportunity for the current cycle and navigate you to the Opportunity **Details** page.

a. The system will name the opportunity based on the start date entered in the Create Portfolio page.

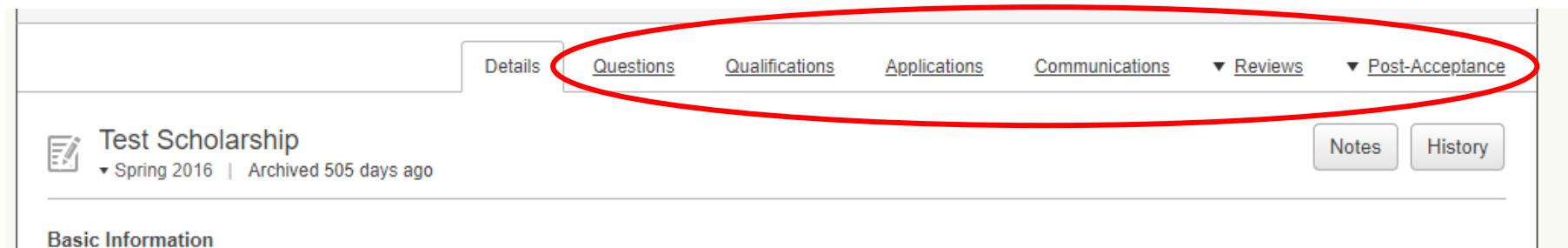
- i. For example, if the start date is 04/01/2018, the opportunity will be named Spring – 2018. If the start date is 06/01/2018, the opportunity will be named Summer – 2018.

b. The portfolio information will display in read-only format. If edits are required, the changes must be made at the portfolio level, not the opportunity level.

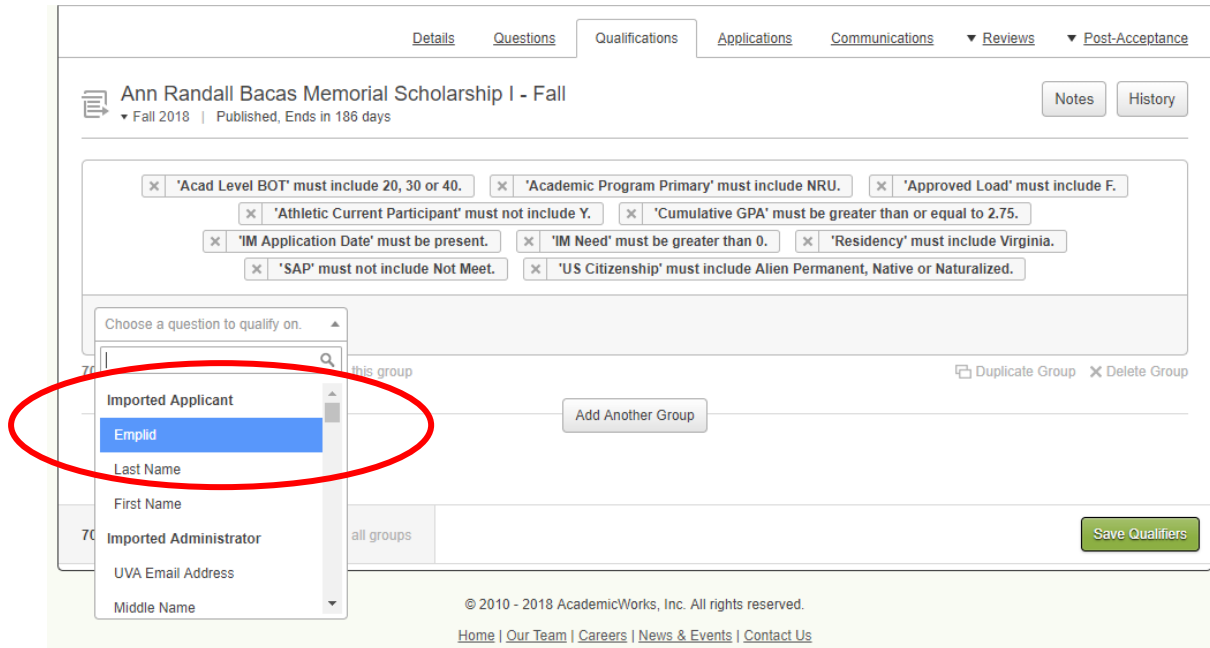
c. The initial opportunity data can be edited on the opportunity page at this time.



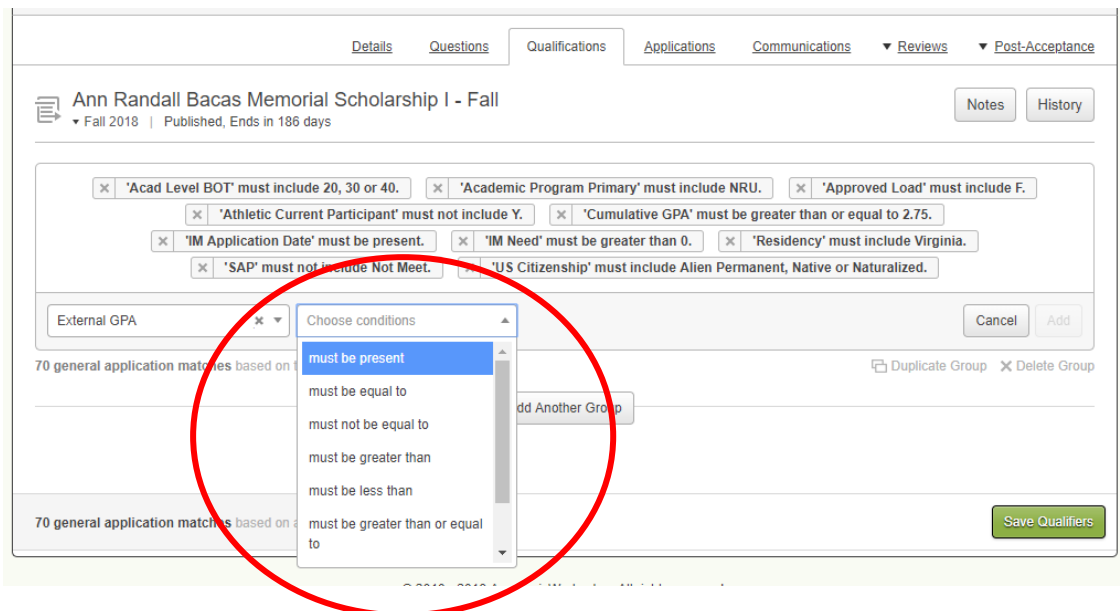
5. Review the opportunity data previously entered on the Create Portfolio page and enter any new opportunity-specific information in the following fields:
 - a. **Hide Applicant Name from Reviewers** – if you are using a reviewer process, you can hide applicant names and make it blind by checking this box.
 - b. **Post-Acceptance End Date** – enter a date here if there is an end date where you no longer want to have students complete any post-acceptance activities (thank-you letters, post-acceptance questionnaires). The post-acceptance form will no longer accessible after this date.
 - c. **Fund Period** – this has to do with roll up of disbursements and we are not currently using it so you can leave it as 'None'
 - d. **Minimum Award Amount** and **Maximum Award Amount** – this is just information on the opportunity for administrative purposes. It is not displayed to students and is not included in any opportunity calculations.
6. **There are several other opportunity pages that require updates once an opportunity has been created:**



7. **Questions** – this is where you would add applicant questions and, as this is an auto-match opportunity, no applicant questions can be added to this opportunity.
8. **Qualifications** – this is where you add criteria that limits the eligibility pool of the students. Any field in on the student record can be used with the exception of Gender (using Gender in an auto-match system is a violation of Title VI).
 - a. **Note:** Eligibility criteria will need to be reviewed by your Academic Works administrator in SFS prior to the opportunity being awarded. If you have questions about how to set up eligibility criteria, please contact Amy Nolasco at akn4b@virginia.edu.
 - b. In order for the auto-match process to begin, at least one qualification must be entered.
 - c. Select a field to be used as a qualification by using the dropdown box titled '**Choose a question to qualify on.**'



d. Depending on the field selected and its data type (numeric, text, etc.), there will be different available conditions for selection:



- e. Depending on the condition selected, additional information may be required such as a specific value or a selection.
- f. Once you have entered a new criterion completely, select **'Add'**.

The screenshot shows the 'Qualifications' tab for the 'Ann Randall Bacas Memorial Scholarship I - Fall'. At the top, there are navigation tabs: Details, Questions, Qualifications, Applications, Communications, Reviews, and Post-Acceptance. Below the title, there are 'Notes' and 'History' buttons. A list of existing criteria is shown, each with a close button (x):

- 'Acad Level BOT' must include 20, 30 or 40.
- 'Academic Program Primary' must include NRU.
- 'Approved Load' must include F.
- 'Athletic Current Participant' must not include Y.
- 'Cumulative GPA' must be greater than or equal to 2.75.
- 'IM Application Date' must be present.
- 'IM Need' must be greater than 0.
- 'Residency' must include Virginia.
- 'SAP' must not include Not Meet.
- 'US Citizenship' must include Alien Permanent, Native or Naturalized.

Below the list is a form for adding a new criterion. It contains a dropdown menu with 'External GPA', a comparison operator 'must not be equal to', and a text input field with '3.5'. To the right of the form are 'Cancel' and 'Add' buttons. The 'Add' button is circled in red. Below the form, there is a button 'Add Another Group' and a 'Save Qualifiers' button at the bottom right.

- g. You can also add an additional qualification group by selecting the option to 'Duplicate Group' on an existing group or the option to 'Add Another Group'.

This screenshot is identical to the one above, showing the same criteria list and form. In this version, the 'Add Another Group' button is circled in red. Additionally, the 'Duplicate Group' and 'Delete Group' buttons are also circled in red. The 'Add' button from the previous screenshot is no longer circled.

- h. Adding groups allows you to pull in different cohorts of students based on different qualifiers for eligibility matching.
- i. Once you have completed all your qualifications and qualification groups, select **'Save Qualifiers'**.
 - i. Note that the number of applications that match each of your groups is displayed after you Save along with the total number of application matches based on all groups.

The screenshot displays the 'Andrew W and Anna B Merle Scholarship' page for Fall 2018. It features two qualification groups, each with a set of criteria and a 'Choose a question to qualify on.' dropdown menu. The first group shows 21 general application matches, and the second group shows 14. A total of 27 general application matches is shown at the bottom. A 'Save Qualifiers' button is highlighted in the bottom right corner.

Andrew W and Anna B Merle Scholarship
▼ Fall 2018 | Published, Ends in 186 days

Notes History

× 'Academic Career' must include UGRD. × 'Athletic Current Participant' must not include Y.
× 'Cumulative GPA' must be greater than or equal to 2.00. × 'Home State' must include MD. × 'IM Application Date' must be present.
× 'IM EFC' must be less than or equal to 5328. × 'SAP' must not include Not Meet.
× 'US Citizenship' must include Alien Permanent, Native or Naturalized.

Choose a question to qualify on. ▼

21 general application matches based on this group Duplicate Group Delete Group

OR

× 'Academic Career' must include UGRD. × 'Athletic Current Participant' must not include Y.
× 'Cumulative GPA' must be greater than or equal to 2.00. × 'Home State' must include MD. × 'IM Application Date' must be present.
× 'IM EFC' must be less than or equal to 5328. × 'Prior Package Plan' must contain _LI. × 'SAP' must not include Not Meet.
× 'US Citizenship' must include Alien Permanent, Native or Naturalized.

Choose a question to qualify on. ▼

14 general application matches based on this group Duplicate Group Delete Group

OR

27 general application matches based on all groups

0, 50, GR, P1, P2, P3, P4, 00, L10, I6, L6, L5, L7, L8 or L9. × 'Academic Career' must include UGRD.

Save Qualifiers

9. **Applications** – this is a grid view of all student applications that are eligible for the opportunity based on the qualifications entered.
- You can filter and sort this grid view any way you wish and hide/display columns using the toolbox on the header of the grid. And, you can download the data to a CSV file which you can manipulate in Excel.
 - Note:** if you filter/sort the grid and want to download the result, you **MUST** save the view first. Otherwise, the original view will be downloaded.

Andrew W and Anna B Merle Scholarship
 ▾ Fall 2018 | Published, Ends in 186 days

Notes History Award Mode

Begin typing to search by name, email address, or user ID...

✓ ✕ ☆ □ ↓ ≡ ⌂ ☰

Selection Grid 1-25 of 25 Page 1

<input type="checkbox"/>	View	Emplid	Last Name	First Name	Gender	Qualifica...	Home State	Official State	Encumb...	Amount ...	Encumb.
<input type="checkbox"/>	View				Male	1	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Male	2	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Female	1	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Female	1	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Male	2	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Male	2	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Female	2	MD	Maryland	0	\$0.00	\$0.00
<input type="checkbox"/>	View				Female	2	MD	Maryland	0	\$0.00	\$0.00

1. **Communications** – if you would like to auto-generate communications to students based on award status, you would add specific text in this page. All student communications must be reviewed by your Academic Works administrator in SFS. Please contact Amy Nolasco at akn4b@virginia.edu to set up communications.
2. **Reviews** – if you would like to implement a reviewer process for your opportunity, please contact Amy Nolasco at akn4b@virginia.edu to discuss set-up.
3. **Post-Acceptance** – post-acceptance is a request for follow-up for a student after they have been awarded. This can be used to gather thank-you letters or post-acceptance questionnaire information. If you would like to set up a post-acceptance process, please contact akn4b@virginia.edu to discuss.